Source2Pay Project

Process – Documentation Storage

Current State

Focus Group Meeting

October 2017
Agenda

- Welcome/Introductions
- Source-to-Pay Project Overview
- Project’s Process Details
- Process Current State
- Current State Identify Issues
- Next in the project’s process
- Questions
Welcome!

- Introductions
  - Name
  - Department
  - Current Job
Source2Pay Project

Our current source-to-pay procedures at the University has significant opportunities for improvement and impact every department within the University system.
Project Purpose/Goal

- Identify process improvements throughout source to pay process
- Develop RFP
- Ultimate goal is to minimize, improve & standardize IT platforms
Project Process

Capture Current State

- Map process
- Current state document
- Present to Universities in focus group setting
- Present feedback to the team
- Finalize current state
- Present to Director Council
Project Process

Create Future State

- Map process
- Identify Issues
- Brainstorm recommendations
- Present to Universities in focus group setting
- Present feedback to the team
- Finalize proposed solutions
- Present to Director Council
Process – Documentation Storage

Purpose of the process

The process ‘Documentation Storage’ exist to:

‘Provide an informational path of documentation used in the procurement and payment of a good or service to the University of Illinois while complying with State regulations and mandates, University policies, and guidelines established by Records and Information Management Services (RIMS).’
Process – Documentation Storage

Process Boundaries

Begins:
Identification of what documents are required to be kept for Purchasing and Procurement Services

Ends:
Retained according to the requirements for Federal/State/University/Departmental retention policies, and receipt of permission to destroy from State and/or the University Systems Records and Information Management Systems (RIMS)
Process – Documentation Storage

1. Create/receive documentation
2. Store working documents
3. Identify documents to be stored in repository
4. Storage retention documentation
5. Disposition
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Create/receive documentation → Store working documents → Identify documents to be stored in repository → Storage retention documentation → Disposition
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Process – Documentation Storage

- Create/receive documentation
- Store working documents
- Identify documents to be stored in repository
- Storage retention documentation
- Disposition
What do you do to store documentation used during the procurement and payables processes
Issues with the current process?
Next Steps

- Present feedback to Project’s process Team
- Finalize current state
- Begin future state
- Present future state to each University
Contact Information

Kristi Moore
BPI Shared Services
klmoore@uillinois.edu
217-333-6259

Mark Brink
OBFS - Business Solutions & Support
mabrink@uillinois.edu
217-244-6054
Thank you!